

# HUBBIS MIDDLE EAST INVESTMENT FORUM 2022

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion - Sponsored by Saxo Bank

Middle East Private Wealth Leaders – Positioning for & Embracing Growth in the Post-Pandemic World

- What is your vision for wealth management in the Middle East in a (hopefully) Post Covid-19 world?
- What growth potential lies ahead in 2022 and beyond, and where are the key opportunities for the foreseeable future?
- What is happening to the private client base in the Middle East, and how are clients' needs and expectations changing?
- How are leaders in this industry enhancing their value proposition, products and service offering?
- Are they succeeding in becoming more client-centric, in boosting relevance, building more sustainable revenues and a more genuinely holistic offering?
- Are the banks managing to boost their advisory and DPM income, thereby reducing the weighting of the ad hoc, product-selling type revenues?
- Where are they in their digital transformation journeys, and what are the next destinations ahead?
- More generally, How will the competitive arena evolve in the coming several years? Are the leaders ready for those challenges?
- How are you evolving the quality and type of advice you offer to clients?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Salman Haider  
Chief Executive Officer - Group Wealth Management  
Habib Bank AG Zurich

Nicholas Wright  
Regional Head of Institutional Business  
Saxo

Ramzi Khleif  
General Manager - MENA  
StashAway

Ayesha Abbas  
GM – Affluent, Head of Priority & Premium Banking, and Branch Network, UAE  
Standard Chartered Bank

Tim Searle  
Founder and Chairman  
Globaleye

9.45am

Presentation  
Finding opportunities in increasingly challenging and volatile markets

Gregoire Mivelaz  
Fund Manager and member of Atlanticomnium's Management Committee  
GAM Investments

- Navigating uncertainties to generate positive returns
- Where to find the best opportunities in the credit markets
- Maximising Income while reducing risks

10.00am

Panel Discussion - Sponsored by GAM Investments

How do you get safe and reliable income today?

- What are the opportunities and challenges in the fixed income and credit markets?
- How do you deal with market volatility and higher inflation?
- How do you make the most of opportunities in private markets?
- What are the alternative sources of income?
- What's the role of funds and ETF's?
- Do you see an increasing opportunity to invest in digital assets and new types of investment (like private placements)?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Oliver Kettlewell  
Head of Fixed Income & Global Portfolios  
Mashreq

Fadi Barakat  
Chief Investment Officer  
REYL Intesa Sanpaolo

Philip Rosenberg  
Managing Director and Head of Distribution - Middle East  
GAM Investments

10.30am

Presentation  
Deep Dive: Navigating the Attractive Opportunities in China

Carol Wong  
Managing Director, Head of International Institutions, Head of Marketing and Investor Services, Institutional Business Development Department  
Ping An of China Asset Management (Hong Kong)

- AI Multi-factor Enhanced A-shares Strategy helps to optimize a well-diversified equity portfolio.

- RMB Bonds provide high yields with low correlation to major asset classes.
- China Green Bonds are creating huge environmental and financial impact

10.45am

Panel Discussion - Sponsored by Ping An of China Asset Management (Hong Kong)

China: Investment Opportunities 2022 and Beyond

- What sort of exposures should Middle East clients have to China and why?
- Are China's equity markets over-valued, fully valued or undervalued and why?
- Should private clients in Middle East be looking also at China's vast fixed income markets, especially after the concerns over debts in the property sector?
- What is the outlook of RMB?
- How's the progress of ESG investing in China? What are the best opportunities?
- Broadly, how should investors be positioning themselves for the next 2-5 years or even beyond? Onshore or Offshore? Alternative investments? And why?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Carol Wong  
Managing Director, Head of International Institutions, Head of Marketing and Investor Services, Institutional Business Development Department  
Ping An of China Asset Management (Hong Kong)

Dr. Nick Xiao  
Chief Executive Officer  
Hywin International

11.15am

Refreshment & Networking

11.45am

Presentation

Future proof your client's investment portfolio: using insurance bonds as an investment platform

Graham Morrall  
Global Sales & Marketing Director  
Hansard Global

- Insurance is an important part of the investment landscape
- Mobile individuals need flexible solutions
- Insurance is a robust and well-established environment for client wealth

12.15pm

Panel Discussion

Curating portfolios, delivering advice and scaling the proposition

- How are you curating portfolios today?
- What goes in the mix?
- How important is DPM? How are you developing the proposition? How can you scale it?
- What solutions and tools are in the pipeline that will further enhance personalisation, relevance and higher quality advice?

- How is assisted advisory developing? Where does the RM/Advisor fit into wealth management market in the future?
- What digital solutions are being introduced to enhance RMs skills, capabilities and productivity?
- Is the hybrid model the way forward for the upper segments of wealth?
- What digital solutions and tools are out there to help deliver the hybrid model for the HNW and upper segments of wealth in terms of delivery of optimised portfolio allocation and advice?
- What is hyper-personalisation in wealth management, and how can it be attained?
- Is enough being done by the technology providers and the top management to help the RMs and advisors become engaged with the digital solutions and tools at their disposal?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Prashant Tandon  
Chief Executive Officer  
Lighthouse Canton

Salman Bajwa  
Managing Director, Market Head  
Bank of Singapore

Damian Hitchen  
Chief Executive Officer, MENA  
Saxo

Sivadeet Baruah  
Head of Individual Life Insurance  
Oman Insurance

1.00pm

Lunch & Networking

2.00pm

Forum Ends